

DEPARTMENT OF AGING

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PROGRAM MEMO (PM)

TO: AREA AGENCIES ON AGING (AAA) DIRECTORS	NO.: PM 04-13 (P)
SUBJECT: Instructions for the Area Plan Year-End Report for the Planning Period Fiscal Year (FY) 2003-04	DATE ISSUED: July 13, 2004
REVISED	EXPIRES: One-Year from Date of Issuance
REFERENCES: PM 00-21	SUPERSEDES: PM 03-16 (P)
PROGRAMS AFFECTED: <input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Title III-B <input checked="" type="checkbox"/> Title III-C1/C2 <input checked="" type="checkbox"/> Title III-D <input checked="" type="checkbox"/> Title V <input type="checkbox"/> MSSP <input checked="" type="checkbox"/> Title VII <input type="checkbox"/> ADHC <input checked="" type="checkbox"/> HICAP <input checked="" type="checkbox"/> Other State-Funded Grant <input type="checkbox"/> Other:	
REASON FOR PROGRAM MEMO: <input type="checkbox"/> Change in Law or Regulation <input checked="" type="checkbox"/> Other Specify: <u>Update Requirements</u>	
INQUIRIES SHOULD BE DIRECTED TO: Your Assigned Area Plan Update Analyst	

The purpose of this Program Memo is to convey to AAAs the "Instructions for the Area Plan Year-End Report for the Planning Period FY 2003-04." The California Department of Aging (CDA) uses the Area Plan Year-End Report when reporting to federal and State officials on AAA activities, achievements, and significant barriers to local goals.

Overview

The Reference Guide for the 2001-05 Area Plan development [PM 00-21 (P)] states that the purpose of the Year-End Report is to provide a retrospective account of progress made toward specified goals during the preceding FY. The Year-End Report provides a performance report for the community and CDA. It reaffirms the important role of AAAs as the advocate, planner, and administrator of programs for seniors and disabled adults in their local Planning and Service Area (PSA).

A Year-End Report may be used to inform the public about: (1) the AAA's key activities during the preceding year; (2) significant achievements during the preceding year; and (3) the difficulties the AAA has encountered in executing its charge. It is similar, in this respect, to a corporate annual report.



CDA has determined that the Year-End Report satisfies the following Older Americans Act plan requirement at OAA, Section 306 (a) (4) (A) (ii) (III):

“ . . . with respect to the fiscal year preceding the fiscal year for which such plan is prepared...provide information on the extent to which the area agency on aging met the objectives described in clause (i) . . . area plan.”

Format and Content

The format and content of the Area Plan Year-End Report is to follow the guidance provided in PM 00-21 (P), which is summarized below.

- The Year-End Report may be written using either narrative or objective-by-objective format.
- The final Year-End Report, submitted at the end of the four-year planning cycle, should include a discussion of the known impact of activities undertaken during the entire planning cycle.
- The Year-End Report should include a discussion of the objectives set for the preceding year which were completed, remain incomplete, and/or where changes to objectives were necessary. Circumstances, which affected progress toward specific goals, resulting in revised objectives, should also be addressed.
- AAAs who expended any amount of funds for Program Development (PD) and/or Coordination (C) during the period covered by the Year-End Report must include an explanation of their PD and/or C accomplishments. The explanation should clearly indicate what objectives were achieved, deleted, or extended into a later FY. Any accompanying narrative should clearly describe the reasons for a particular status of each objective. The information regarding progress toward PD and/or C objectives will assist the Department in reviewing the cost claimed for PD and/or C in the Financial Closeout for the applicable FY.
- Content should be specific and identified to allow for linking or cross-referencing with specific objectives stated in the Area Plan.

Transmittal

- An original and two copies of the Year-End Report and the transmittal letter are sent to the AAA's assigned Area Plan Analyst (see attached list – page four of this memo).

- The letter of transmittal must be dated and signed by the AAA Director, the Governing Board Chair, and the Advisory Council Chair.
- A separate Year-End Report will not be required for the Title III-E Family Caregiver Support Program for FY 2003-04.
- The Year-End Report is due annually, no later than August 31 of the FY. The Area Plan Year-End Report for FY 2003-04 is due no later than August 31, 2004.

Original Signed By Lynda Terry

Lynda Terry
Director

Attachment

ATTACHMENT I

2003-04 Area Plan Update Analyst Roster

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